

Attorney Catherine A. Amador (for Co-Conservator Sylvia JP Gonzalez)

Probate Status Hearing Re: Filing of the Fourteenth Account

		<p>SYLVIA J.P. GONZALES, sister, and RACHEL REUTHER, daughter, were appointed Successor Co-Conservators of the Person and Estate on 11/13/2014.</p> <p>Minute Order dated 3/19/2015 from the hearing on the Thirteenth Account set this status hearing on 8/25/2016 for the filing of the Fourteenth Account.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 8/25/2016.</u> <i>Minute Order</i> states counsel requests 30 days. If the accounting is not filed, a status report verified by both Co-Conservators is required at least two days prior to 9/29/2016.</p> <p>1. Need Fourteenth Account of the conservatorship estate, or a verified status report and proof of service of notice of the status hearing with a copy of the status report to all interested parties pursuant to Local Rule 7.5(B).</p>
Cont. from 082516			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt	X		
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: LEG</p> <p>Reviewed on: 9/23/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 1- Larssen</p>	

**First and Final Account and Report of Successor Administrator and Petition
for Allowance of Ordinary and Extraordinary Commissions and Fees and for
Distribution.**

DOD: 11/25/2004		PUBLIC ADMINISTRATOR , Successor Administrator, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 9/8/16. Minute order states Pamela Van Camp, and any other objecting party, must file written objections by 9/22/16. – As of 9/23/16 no additional documents have been filed. 1. Amendment to First and Final Account was filed on 8/31/16. Pursuant to California Rules of Court, Rule 7.53(a) an amendment to a pleading requires the same notice of hearing as the pleading it amends. Therefore, need proof service of the Notice of Hearing, 15 days prior to the hearing on: a. Preston Van Camp b. Pamela Van Camp Please see additional page
		Account period: 1/5/07 – 5/25/16	
Cont. from 072116, 090816		Accounting - \$176,659.00	
		Beginning POH - \$175,249.00	
Aff.Sub.Wit.		Ending POH - \$ 48,067.23	
✓	Verified		
✓	Inventory	Administrator (statutory) - \$3,306.36	
✓	PTC	Administrator x/o - \$1,248.00 (for sale of real property and preparation of taxes)	
✓	Not.Cred.		
✓	Notice of Hrg	Attorney (statutory) - \$3,306.36	
✓	Aff.Mail W/	Attorney x/o - \$1,890.00 (itemization, 12.5 hours @ \$150/hour for unlawful detainer with appeal)	
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen		Court Costs - \$46.50 (certified copies)	
✓	Letters 4/14/05	Closing - \$2,000.00	
Duties/Supp			
✓	Objections	Distribution, pursuant to intestate succession and assignments of interest is to:	
Video Receipt			
CI Report		Preston Van Camp - \$23,301.14	
✓	9202	Pamela Van Camp - \$11,650.57	
✓	Order		
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
✓	FTB Notice		

Please see additional page

Reviewed by: KT

Reviewed on: 9/23/16

Updates:

Recommendation:

File 2- Van Camp

Objection to Final Account filed by Preston Van Camp on 7/7/16. Objector states he was removed as Administrator of the Estate by this Court on 11/28/06 for failure to file an accounting and distribution.

Mr. Van Camp alleges he never mismanaged the estate and no evidence was ever introduced to this court supporting a claim of mismanagement nor was there every any action on the part of Van Camp that led to a loss of estate assets.

The final Accounting submitted by Kruthers did not approve Van Cam his filing fee of \$281.00 nor his 280.00 for notice of publication. Van Camp objects to not receiving reimbursement for these fees.

Van Camp spent hundreds of working hours on the estate, researched over 10 years of personal income taxes for the decedent and her deceased husband. Van Camp filed proper notices with the County of Fresno so that the property tax would be adjusted according to law. Personal payments on the estate's real property, association fees, and property taxes were made during the entire time Van Camp was administrator. Van Camp published notices of the estate, filed the petition plus status reports to the court and submitted three accountings of the estate. Van Camp noticed all creditors including Medi Cal and the State of California. Van Cam had the real property appraised and filed the inventory and appraisal. Most of the estate had already been completed by Van Camp, except for the selling of the real property and paying the debts.

Kruthers and the Fresno County Public Administrator took over management of the estate in November 2006. During the vast majority of the ten years since the County took over, they did nothing and let the estate fall into waste, disrepair, and substantial loss of market value. There is evidence of mismanagement in this estate by Fresno County. Van Camp asks the court to take judicial notice of the public administrator assigned to this estate throughout the last ten years and their subsequent criminal charges related to their job duties as public administrators.

For these reasons, Van Camp objects to Kruthers failure to distribute to Van Camp any administrator fees. Van Camp objects to Kruthers' request for extraordinary fees in its entirety based upon the negligence of the County of Fresno Public Administrator and also request that Kruthers is not entitled to any attorney fees, or public administrator fees, or at most a very minimal amount.

Kruthers had notice that there was an ongoing claim by Pamela Van Camp who was paying the mortgage and homeowner association dues throughout all the years this case was in probate. The approval of a claim by the Public Administrator and Kruthers for costs paid to the mortgage company are dubious at best since the liquid assets in the estate was limited to \$9.00. Van Camp requests receipts showing proof the Public Administrator made those payments.

Finally, Van Camp objects to Kruthers' Final Accounting which never addressed nor paid the Claim of Lien that Fan Camp filed with the Fresno County Recorder's Office in the amount of \$37,061.12 and recorded on the real property in the estate.

Please see additional page

NEEDS/PROBLEMS/COMMENTS (Cont.):

2. Amendment to First and Final Account alleges that at the hearing on 7/21/16 Pamela Van Camp provided a writing that Preston Van Camp had executed returning her interest in property that she had previously assigned to Preston. That document has not been filed, but Preston Van Camp admitted in Court that what Pamela had was a signed writing by him assigning Pamela's interest back to her. Court may require the document assigning the property back to Pamela to be filed prior to distribution.

First and Final Account of Administratrix and Petition for Final Distribution

DOD: 5/18/07		ALICE HOUSTON , Daughter and Administrator with Full IAEA with bond of \$67,000.00, is Petitioner. Petitioner waives accounting. I&A: \$335,000.00 POH: \$335,000.00 (real property located at 3045 S. Clara in Fresno) Petitioner states the decedent died intestate, leaving no spouse or registered domestic partner. The decedent had three children (none deceased). Petitioner requests distribution of the entire estate (real property) to herself only.	NEEDS/PROBLEMS/COMMENTS: Minute Order 8/25/16: The Court deems the consents filed by Willie Tims and Milton Tims to be assignments and accepts them as assignments with which they will be receiving no portion of the property, and with which Alice Houston will be receiving all portions of the property. If they do not wish to give their interests away, they must file paperwork no later than 9/27/16. The Court further orders that the filing fee be paid before the Court will approve the petition. Note: As of 9/23/16, nothing further has been filed. The filing fee has now been paid. If nothing further is filed by 9/27/16, it appears this matter can go forward. 1. Need Order.
Cont. from 063016, 082516			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters 3/29/11		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input type="checkbox"/>	Order x		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

Reviewed by: skc
Reviewed on: 9/23/16
Updates:
Recommendation:
File 3- Tims

Second Account and Report of Trustee of Michaela Dawn Lozano Special Needs Trust; Petition to Settle Account; and to Fix and Allow Attorney Fees

		MELISSA LOZANO , Trustee, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 7/17/14 – 7/16/16	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.	Accounting - \$106,388.52	
<input type="checkbox"/>	Verified	Beginning POH - \$103,794.24	
<input checked="" type="checkbox"/>	Inventory	Ending POH - \$ 64,038.62	
<input type="checkbox"/>	PTC	Trustee - Not requested	
<input type="checkbox"/>	Not.Cred.	Attorney - \$1,250.00	
<input checked="" type="checkbox"/>	Notice of Hrg	(per Local Rule)	<p>Note: If the petition is granted, a status hearing will be set as follows:</p> <ul style="list-style-type: none"> Wednesday, September 26, 2018 at 9:00 a.m. in Department 303, for the filing of the second account. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
<input checked="" type="checkbox"/>	Aff.Mail	Current bond is \$110,000.00	
<input type="checkbox"/>	Aff.Pub.	Petitioner request that based on the property on hand the bond be reduced to \$70,000.00 (o.k.)	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Petitioner prays for an Order:	
<input type="checkbox"/>	Letters	1. Approving, allowing and settling the second account;	
<input type="checkbox"/>	Duties/Supp	2. Authorizing the attorney fees;	
<input type="checkbox"/>	Objections	3. Reducing the bond to \$70,000.00.	
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Attorney Thomas Markeson; Richard Harris (for Administrator Kevin Gunner)

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

DOD: 10/29/2013	KEVIN GUNNER , Attorney at Law, was appointed Administrator with Will Annexed with Full IAEA authority with bond of \$384,000.00 on 2/11/2014. <i>Proof of Bond</i> was filed 2/21/2014. <i>Letters</i> issued on 2/24/2014.	NEEDS/PROBLEMS/COMMENTS:
		OFF CALENDAR
Cont. from 041015, 080615, 022516, 062316	Pursuant to Probate Code § 8800(b) , <i>Final Inventory and Appraisal</i> was filed 7/17/2014 showing an estate value of \$888,465.61 .	Petition For Approval of Settlement of Account filed 9/7/2016 is set for hearing on 10/19/2016.
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Pursuant to Probate Code § 12200 , first account and/or petition for final distribution was due 2/24/2015.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC	Minute Order dated 2/11/2014 from the hearing on the petition for letters of administration set this status hearing on 4/10/2015 for filing of the first account and/or petition for final distribution.	
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	Status Report on Final Distribution filed 6/17/2016 by Attorney Markeson for the Administrator states:	
<input type="checkbox"/> Aff.Pub.	<ul style="list-style-type: none"> This estate is not yet ready for distribution, and is likely insolvent; the Administrator has sold all personal and real property of the estate; some personal items have not yet been paid for nor picked up from the Administrator; Administrator is in possession of cash of ~\$50,000.00; Preparation of the accounting schedules are in progress; The estate is a named defendant in the matter of <i>Diocese of San Joaquin and The Episcopal Church v. Shofield</i> (08CECG01425); the defendants appealed to the Fifth District Court of Appeal; On 4/5/2016, the Court of Appeal issued an opinion in favor of the Plaintiffs, and on 5/4/2016, modified its opinion but left the judgment intact; The Defendants filed a petition for review with the Supreme Court of California on 5/16/2016; the Court has at least 60 days to grant review, but the Court may extend the deadline for one or more additional periods up to 30 days; He requests this matter be continued to 9/26/2016 or later in order for the Supreme Court to act; If the Supreme Court grants review, additional time will likely be required; if review is not granted, the case will be over, according to litigation counsel. 	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		Reviewed by: LEG
<input checked="" type="checkbox"/> Status Rpt		Reviewed on: 9/23/16
<input type="checkbox"/> UCCJEA		Updates:
<input type="checkbox"/> Citation		Recommendation:
<input type="checkbox"/> FTB Notice		File 5 - Schofield

Probate Status Hearing Re: First or Final Account

DOD: 1/18/2014		<p>SANDRA BROWN was appointed Executor with full IAEA without bond on 3/19/2015.</p> <p>Letters issued 3/25/2015.</p> <p>I&A filed 1/4/2016 shows estate valued at \$115,973.96.</p> <p>Minute order dated 3/19/2016 set this status hearing for filing of the first or final account.</p> <p>Former status report filed 7/22/2016 stated most of the tasks required to close the probate have been completed. In the interest of conserving resources and saving the Court's time, Executor wishes to file a first and final accounting rather than a first accounting followed shortly by a second final accounting. The only remaining tasks to complete are the escrow on the sale of real property, the ancillary matter in Louisiana to transfer the property, and the accounting and petition for final distribution.</p> <p>Petitioner requested a status hearing on the first accounting be scheduled for a date in October 2016, at which time all tasks should be completed and the first and final accounting and petition for final distribution will hopefully be filed.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 7/28/2016. The following issues still exist:</p> <p>1. Need first account, petition for final distribution or <u>current</u> written status report pursuant to Local Rule 7.5, which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>	
Cont. from 062316, 072816				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt	x		
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
<p>Reviewed by: SEF</p> <p>Reviewed on: 9/22/2016</p> <p>Updates: 9/23/2016</p> <p>Recommendation:</p> <p>File 6- Robinson</p>				

Petitioner Melinda C. Simental (Pro Per, mother, Guardian of the Estate)

First Account and Report of Melinda C. Simental of Gabrielle Krystal Simental and Estate

		MELINDA C. SIMENTAL , mother and Guardian of the Estate, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR <i>Amended First Account and Report filed 9/15/2016 is set for hearing on 10/31/2016.</i> Continued from 8/4/2016. Minute Order states the Court orders that the funds must be placed into two separate federally insured accounts, with proof being filed prior to the 9/1/2016 hearing. 1. Need Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account (Judicial Council form MC-356) for the two federally insured blocked accounts. 2. Need Amended First Account, which reflects the change from a single blocked account valued at \$286,623.65 to two federally insured blocked accounts, with the specific amounts contained in each account. 3. Notice of Hearing has not been filed showing proof of notice to the ward, GABRIELLA KRYSTAL SIMENTAL , pursuant to §§ 2621 and 1460. However, Court may excuse notice to the ward under Probate Code § 1460.1, if the Court determines that notice was properly given to a parent or guardian with whom the minor resides; or that the petition is brought by a parent or guardian with whom the minor resides. If Court confirms that the ward resides with the Petitioner, Court may excuse proof of service of notice to the ward.	
Cont. from 080416, 090116				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	2620			Non-original
	Order			X
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: LEG				
Reviewed on: 9/23/16				
Updates:				
Recommendation:				
File 7- Simental				

8 Ed Rontell (Estate) Case No. 14CEPR00814

Attorney Helon, Marvin T (for Steve Rontell & Nicholas L. Lucich, Jr. – Co-Executors)

Probate Status Hearing RE: Informal Accounting of the Reserve

	STEVE RONTCELL and NICHOLAS LUCICH, JR., were appointed Co-Executors, with full IAEA authority without bond on 10/14/2014.	NEEDS/PROBLEMS/COMMENTS:
	Letters issued on 10/14/2014.	
	Order on Waiver of Accounting and Final Distribution was settled on 09/17/2015.	<u>OFF CALENDAR.</u> <u>Informal Accounting</u> <u>filed 09/08/2016.</u>
Cont. from 031716	Minute Order of 09/17/2015 set this Status Hearing for the filing of an Informal Accounting of the Reserve of \$38,734.06.	
Aff.Sub.Wit.	Status Report filed 02/24/2016 states on 09/17/2015 the Court entered herein its Judgment Settling Report of Co-Executors on Waiver of Account and for Approval of Division of Community Property and for Approval of Statutory Attorney's Fees, Reimbursement of Costs and for Final Distribution. Pursuant to said Judgment, the Court scheduled a Status Hearing for March 17, 2016 for an informal accounting for the reserve. Balance of the Reserve account is \$23,149.06 after the following disbursements: <ul style="list-style-type: none">• Baker, Petersen & Franklin CPA Preparation of Federal Estate Tax Return - \$8000.00• Backer, Petersen & Franklin CPA Preparation of Income Tax Returns - \$1,820.00.• United States Treasury Taxes on Federal Fiduciary Income Tax Return - \$5,491.00.• Franchise Tax Board Taxes on California Fiduciary Income Tax Return - \$274.00. The Federal Estate Tax Return for the Estate has now been approved by the Internal Revenue Service. However, the Co-Executors request authorization to continue to hold the reserve for an additional six months in the event of any audit and associated expenses in connection with the Fiduciary Income Tax Returns for the Estate.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
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Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
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Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Wherefore, the Co-Executors request the Court:

1. Approve the Status Report;
2. Authorize the Co-Executors to continue to hold a closing reserve of \$23,149.06 for up to six months, and
3. For such other and further relieve the Court deems proper.

Reviewed by: LV**Reviewed on:** 09/26/2016**Updates:****Recommendation:****File 8- Rontell**

Petitioner Ja-Hadrha Johnson (Pro Per, mother)
Guardian Willie Mae Johnson (Pro Per, maternal aunt)

Petition for Termination of Guardianship

		JA-HADRHA JOHNSON, mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		~Please see Petition for details~	Continued from 8/3/2016. Minute Order states the Court orders that visitation for Ja-Hadrha Johnson is to transition to every weekend, beginning on 8/5/2016, from Fridays at 2:30 pm through Sundays at 5 pm. The Court further orders that Ja-Hadrha Johnson may babysit the minor Monday through Friday during the day while the Guardian is at work. Beginning September 2 nd , Ja-Hadrha Johnson will have the minor every other week from Friday at 2:30 through the following Friday at 2:30, and may still babysit the minor while the Guardian is at work during the alternate weeks. On 9/29/2016, the Court will consider terminating the guardianship.
Cont. from 071316, 080316			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W /	
	Aff.Pub.		
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	Pers.Serv.		
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	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 9/23/16
			Updates:
			Recommendation:
			File 9- Campbell

First and Final Account and Report of Executor and Petition for its Settlement, for Allowance of Compensation to Executor and Attorneys for Ordinary and Extraordinary Services and for Final Distribution

DOD: 8/30/96		<p>CARMEN C. MORENO, Daughter, was appointed Executor with Full IAEA without bond on 12/16/14. Letters issued on 1/14/15.</p> <p>Account period: 8/30/96 – 5/25/16 Accounting: \$77,042.74 Beginning POH: \$77,008.85 Ending POH: \$68,131.24 (\$56,122.39 cash plus musical copyrights)</p> <p>Executor (Statutory): \$2,880.35</p> <p>Attorney (Statutory): \$2,880.35</p> <p>Attorney (Extraordinary): \$1,650.00 (for attorney and paralegal time in connection with the sale of the real property, per Exhibit C)</p> <p>Costs: \$1,362.59 (filing, publication, appraisal, certified copies)</p> <p>Closing: \$500.00</p> <p>Petitioner states notice was provided to the Dept. of Health Care Services pursuant to §9202(a). Although no formal claim was filed in this estate, years prior to administration, they did submit to the heirs of the estate a claim. Petitioner negotiated with the DHCS on behalf of her and her sisters and the claim was reduced from \$57,213.54 to \$13,577.39 by exercising a hardship waiver and entering into a payment plan. Two of the daughters could not finish paying, so to prevent further action, Petitioner advanced \$4,186.14 to satisfy the claim in full. See documentation at Exhibit A. Valentina Estrada and Rosa Maria Selzer have consented to reimbursement of Carmen Moreno from their distributive share in the amount of \$2,093.07 each for a total amount to be reimbursed to Carmen C. Moreno of \$4,18.14.</p> <p>Distribution pursuant to Decedent's will, consents to reimbursement, and Distribution Agreement filed 9/15/16:</p> <ul style="list-style-type: none"> Carmen C. Moreno: Musical copyrights valued at \$12,008.85 plus cash of \$19,802.50 (\$15,616.36 plus \$2,093.07 from the share of Valentina Estrada and \$2,093.07 from the share of Rosa Maria Selzer) Valentina Estrada: \$13,523.30 Rosa Maria Selzer: \$13,523.30 	NEEDS/PROBLEMS/COMMENTS:	
Cont. from 071416				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input checked="" type="checkbox"/>	PTC			
<input checked="" type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input type="checkbox"/>	Aff.Pub.			
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<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			1/14/15
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input checked="" type="checkbox"/>	FTB Notice			

Reviewed by: skc

Reviewed on:
9/23/16

Updates:

Recommendation:

File 10- Moreno

First and Final Account and report of Executrix and Petition for Its Settlement, for Allowance of Compensation to Attorneys and Executrix for Ordinary Services, for Allowance of Compensation to Executrix for Extraordinary Services, for Reimbursement of Costs Advanced, and for Final Distribution

DOD: 10/16/14		LINDA GREEN , Executor, is petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Continued to 11/9/16 at the request of the attorney.</u> 1. Need Notice of Hearing. 2. Need proof of service of the Notice of Hearing on all interested parties. 3. Inventory and appraisals filed total \$117,441.47. Petition states a supplemental inventory and appraisal with a value of \$13,606.97 will be filed. Need supplemental inventory. 4. Petition was verified by the attorney. Probate Code §1023 does not allow an attorney to verify for the fiduciary appointed in the proceeding. 5. Need receipts for preliminary distributions. 6. Disbursement schedule shows an unknown disbursement for \$139.11. 7. Need order.
		Account period: 10/16/14 – 7/31/16	
		Accounting - \$131,553.71	
		Beginning POH - \$131,048.44	
		Ending POH - \$ 74,830.97	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified	X	
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters	1/7/15	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
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<input checked="" type="checkbox"/>	Order		
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<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
		<p>Executor (statutory) - \$4,946.61</p> <p>Executor x/o (Local Rule) - \$1,000.00 (per</p> <p>Attorney (statutory) - \$4,946.61</p> <p>Costs - \$1,427.54 (filing fees, probate referee, certified copies)</p> <p>Closing reserve - \$4,000.00</p> <p>Distribution pursuant to Decedent's Will is to:</p> <p>Diane Yvonne Dickinson - \$8,667.37, 1/3 of decedent's jewelry, 1/3 of depression era glassware and 1/3 of the coin collection.</p> <p>Linda Green - \$12,369.83, 1/3 of decedent's jewelry, 1/3 of depression era glassware and 1/3 of the coin collection.</p> <p>Michael Green - \$7,869.83, 2001 Buick Regal, 1/3 of decedent's jewelry, 1/3 of depression era glassware and 1/3 of the coin collection.</p> <p>Tower Foundation of San Jose State University - \$16,103.17 to set up the Carol Nerell Green Memorial Scholarship.</p>	
Reviewed by: KT Reviewed on: 9/26/16 Updates: Recommendation: File 11- Green			

12 Nabella Evangelina Varela (GUARD/P) Case No. 14CEPR01034**Petitioner Vargas, Patricia (Pro Per – Maternal Grandmother)****Petition for Visitation**

Age: 1 year	PATRICIA VARGAS , maternal grandmother, is petitioner. <u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS: Minute Order of 08/11/2016: Examiner notes provided in open court. 1. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Visitation on the following: <ul style="list-style-type: none">• Manuel Edward Varela (Father)• Latisha Renee Deloris 2. Notice of Hearing filed 08/08/2016 is incomplete in the following areas and therefore service is defective regarding Co-Temporary Guardians, Evangelina McAnulty and Dale McAnulty, Sr.: <ul style="list-style-type: none">• #1 of the Notice of Hearing does not include the Petitioner's name nor what was filed.• Proof of Personal Service portion does not include the address that the petitioners were served, as well as the proof of service states they were served on 02/27/2016, six months prior to the petition being filed.
Cont. from 081116		
Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
Inventory		
PTC		
Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
Aff.Mail		
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Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order	x	
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 09/26/2016
		Updates:
		Recommendation:
		File 12- Varela

Attorney Gary L. Winter (for Conservator Jill McCool)

Probate Status Hearing Re: Filing of First Account

			JILL McCOOL , daughter, was appointed Conservator of the Estate on 6/8/2015.	NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR <i>First Account and Report of Conservator of Estate, etc., filed 9/22/2016 is set for hearing on 11/7/2016.</i>
Cont. from 082516				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			
✓	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: LEG	
			Reviewed on: 9/23/16	
			Updates:	
			Recommendation:	
			File 13- Britton	

Status RE: Filing of the Inventory and Appraisal

DOD: 1/23/15	BRUCE BICKEL was appointed Administrator with Full IAEA with bond of \$215,000.00 on 9/23/15.	NEEDS/PROBLEMS/COMMENTS: Note: Order on Second and Final Account of Co-Conservators was entered 7/29/16 and included distribution to Bruce Bickel as Administrator of the Estate. 1. Need Final Inventory and Appraisal per Probate Code §8800 or current written status report per Local Rule 7.5.
	Bond was filed 10/6/15 and Letters issued 10/9/15.	
	At the hearing on 9/23/15, the Court set this status hearing for the filing of the Inventory and Appraisal.	
Cont'd from 022516, 050516, 051216, 062316, 072116, 090116	Status Report filed 2/24/16 states the decedent's conservatorship action Case No. 0237515 which currently holds possession of the assets has not yet concluded. The Second and Final Account is scheduled for hearing on 3/1/16, which petition asks that the assets be delivered to the administrator of the estate. The Administrator has not yet filed an Inventory and Appraisal because the assets have not come into this estate.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters	Therefore, Ms. Horton humbly requests that this status hearing be continued to 3/1/16 or alternatively for 60 days.	
Duties/Supp	Partial I&A No. 1 was filed 9/1/16; however, a Final I&A has not yet been filed.	
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 9/23/16
		Updates:
		Recommendation:
		File 14- Inman

DOD: 01/20/2015	PUBLIC ADMINISTRATOR , was appointed Administrator with full IAEA authority, without bond, on 05/07/2015.	NEEDS/PROBLEMS/COMMENTS: 1. Need First Account or Petition for Final Distribution.
	Letters issued on 05/08/2015.	
Cont. from 072116		
Aff.Sub.Wit.	Final Inventory and Appraisal filed 10/14/2015 shows an estate valued at \$197,904.48.	
Verified		
Inventory		
PTC		
Not.Cred.	Supplemental Inventory and Appraisal filed 10/29/2015 shows an estate valued at \$902.50.	
Notice of Hrg		
Aff.Mail	Minute Order of 05/07/2015 set this status hearing for the filing of the First and/or Final Account.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	Status Report Regarding Filing of Final Account and Report of Administrator filed 09/23/2016 states when the PA was in the process of preparing the account, she realized there was an investment account that had never been inventoried. That must be done before she can file her final account. Because the inventory must go to the probate referee, it is requested that the next status hearing be set 60 days from now.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		Reviewed on: 09/26/2016
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 15- Scott

Status RE: Receipt for Blocked Account

DOD: 4/25/13	JUANITA G. SALINAS , daughter, was appointed Administrator with Will Annexed with Limited IAEA without bond, on 4/19/16. Letters issued 4/19/16.	NEEDS/PROBLEMS/COMMENTS:
Cont. from		
Aff.Sub.Wit.	On 8/11/16, the Court confirmed the sale of real property and ordered the proceeds be placed into a blocked account. The Court set this status hearing re receipt for blocked account.	1. Need receipt for blocked account or status report per Local Rule 7.5.
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 9/23/16
		Updates:
		Recommendation:
		File 16- Garcia

17 Nathina Rios, Brandon Esqueda, Ethan Esqueda (GUARD/P)**Case No. 15CEPR01157**

Petitioner Gutierrez, Paul (Pro Per – Maternal Uncle)

Petitioner Gutierrez, Jamie (Pro Per – Maternal Aunt)

Petition for Appointment of Guardianship of the Person

Ethan Age: 3	<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
	PAUL GUTIERREZ, and JAMIE GUTIERREZ,	Petition is as to Ethan Esqueda only.
	maternal aunt and uncle, are petitioners.	
	<u>Please see petition for details</u>	
Cont. from		Maternal great grandmother, Mary Perez, was appointed guardian of Brandon Esqueda on 02/29/2016. Ms. Perez has filed a Petition for Guardianship of Nathina Rios, the hearing is set for 10/26/2016.
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	x	
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/>		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input checked="" type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 09/26/2016
		Updates:
		Recommendation:
		File 17- Rios/ Esqueda

17

Status RE: Filing of the Inventory and Appraisal

			RAQUEL PINEDA , Daughter, was appointed Conservator of the Person and Estate on 5/5/16 and Letters issued 5/11/16. (Bond reserved)	NEEDS/PROBLEMS/COMMENTS: Note: Ms. Pineda was also appointed conservator of her mother, also named Raquel Pineda, in related matter 16CEPR00014; however, at a status hearing on 8/11/16, Ms. Pineda resigned as conservator and the Court appointed the Public Guardian in that matter. The matter was continued to 10/6/16 for status re capacity declaration. 1. Need Inventory and Appraisal pursuant to Probate Code §2610 or written status report pursuant to Local Rule 7.5.
			At a status hearing re capacity declaration and reserved bond on 5/26/16, the Court set this status hearing for the filing of the Inventory and Appraisal.	
Cont. from				
	Aff.Sub.Wit.			
	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
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	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 9/23/16	
			Updates:	
			Recommendation:	
			File 18- Pineda	

19 Jerry and Jorja Family Trust**Case No. 16CEPR00304****Attorney: Jeffrey A. Jaech (for Petitioner Jill Jones)****Attorney: Scott D. Laird (for Respondent Jorja Jones)****Petition for Orders Ordering Conveyance of Property, Imposing Damages under Probate Code Section 859, Finding Respondent Liable for Elder Abuse, and Imposing Constructive Trust**

		JILL JONES, daughter, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 7/14/16. Minute order states elder abuse is not handled in Probate. The Court will possibly set matter for trial on 9/29/16.	
		Please see Petition for details.		
Cont. from 050216, 060916, 071416		Verified Objection to Petition for Orders Ordering Conveyance of Property, Imposing Damages under Probate Code §859, Finding Respondent Liable for Elder Abuse and Imposing Constructive Trust filed by Jorja Jones on 9/19/16.	<ol style="list-style-type: none"> Petition includes an action for elder abuse. Elder abuse is a separate civil action and should be brought in the Civil Court. Probate Code §17201 requires the petition to include the names and addresses of each person entitled to notice. Probate Code §17203 requires notice to each beneficiary of the trust. Beneficiaries Jamie Lea Tosland and Jared A. Senn are not included in the petition, as persons entitled to notice. Need proof of service of the Notice of hearing on: <ol style="list-style-type: none"> Jamie Lea Tosland Jared A. Senn Need Order. 	
<input type="checkbox"/>	Aff.Sub.Wit.			
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<input type="checkbox"/>	Conf. Screen			
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<input type="checkbox"/>	Video Receipt			
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<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: KT	
			Reviewed on: 6/7/16	
			Updates:	
			Recommendation:	
			File 19- Jorja	

Petition for Appointment of Guardian of the Person (Petitioner Ge Her)

		<p>TEMPORARY EXPIRES 9/29/2016</p> <p>Surapol Vue (competing petitioner) was appointed temporary guardian on 8/8/2016</p> <p>GE HER, maternal grandmother, is petitioner.</p> <p><i>See petition for details.</i></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Please see related page 20A for Surapol Vue's competing petition for guardianship.</p> <p>Continued from 8/8/16. Matter continued due to service defects. The Court orders unsupervised visitation for Ge Her every Saturday, starting 8/13/2016, from 10 am to 6 pm. Exchanges shall occur at 10 am.</p> <ol style="list-style-type: none"> 1. Need proof of service of <i>Notice of Hearing</i> with copy of petition <u>or</u> consents and waivers of notice for: <ol style="list-style-type: none"> a. Wang Pao Vang (paternal grandfather) – <i>unless the Court excuses notice</i> b. Vang Koua Vang (maternal grandfather) 2. Need Orders. 3. Need Letters. 	
Cont. from 080216, 080816				
<input type="checkbox"/>	Aff.Sub.Wit.			
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<input checked="" type="checkbox"/>	Duties/Supp			
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<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
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<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			<p>Reviewed by: SEF</p> <p>Reviewed on: 9/22/2016</p> <p>Updates: 9/23/2016</p> <p>Recommendation:</p> <p>File 20A- Yang</p>	

Petition for Appointment of Guardian of the Person (Petitioner Surapol Vue)

		<u>TEMPORARY EXPIRES 9/29/2016</u>	NEEDS/PROBLEMS/COMMENTS:
		SURAPOL VUE , paternal uncle, is petitioner.	<p>Please see related page 20A for Ge Her's (maternal grandmother) competing petition for guardianship.</p> <p>Continued from 8/8/16. Temporary petition was granted to Surapol Vue, to preserve the status quo. The Court orders unsupervised visitation for Ge Her every Saturday, starting 8/13/2016, from 10 am to 6 pm.</p> <p>Petitioner:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of service with at least 15 days notice of <i>Notice of Hearing</i> with copy of petition <u>or</u> consents and waivers of notice <u>or</u> declarations of due diligence for: <ol style="list-style-type: none"> a. Ni Wang Pao Yang (paternal grandfather) b. Mor Vue (paternal grandmother) c. Neeg Vang (maternal grandfather) d. Ge Her (maternal grandmother) 3. Item 3a of UCCJEA does not include minor Brendan Yang's residence information for past 5 years (2011 through 2013), as required.
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
		See petition for details.	
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	x	
	Aff.Mail	x	
	Aff.Pub.		
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	Pers.Serv.		
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✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report	x	
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: SEF
			Reviewed on: 9/22/2016
			Updates: 9/23/2016
			Recommendation:
			File 20B- Yang

Petitioner

Frantz, James Ben (Pro Per – Son – Petitioner)

Attorney

Kruthers, Heather H. (for Public Guardian)

Attorney

Boyett, Deborah (Court appointed for Proposed Conservatee)

Petition for Appointment of Probate Conservator of the Person

See petition for details.			NEEDS/PROBLEMS/COMMENTS:																																																																								
			Court Investigator advised rights on 8/12/16																																																																								
			<u>Minute Order 8/18/16</u> : The Court orders that counsel be appointed for James D. Frantz, proposed Conservatee. The Court orders the Public Guardian appointed as Temporary Conservator of the Person and Estate, with full authority. Matter continued to 9/29/16 and set on 9/29/16 for status report from PG (Page B).																																																																								
			The following issues remain noted:																																																																								
			1. It does not appear that all relatives within the second degree are listed at #11. Need complete list.																																																																								
			2. Based on the Court Investigator's recommendation, the Court may require that a new petition for general conservatorship of the person and estate, with service on the proposed Conservatee and all relatives within the second degree be filed by the Public Guardian, since this petition requested only limited conservatorship of the person only, and does not appear to have been served on all relatives. If medical consent powers are requested, need capacity declaration.																																																																								
			Reviewed by: skc																																																																								
			Reviewed on: 9/23/16																																																																								
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			File 21A- Frantz																																																																								
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	FTB Notice																																																																										

Petitioner

Frantz, James Ben (Pro Per – Son – Petitioner)

Attorney

Kruthers, Heather H. (for Public Guardian)

Attorney

Boyett, Deborah (Court appointed for Proposed Conservatee)

Status RE: Report from the Public Guardian

		TEMP (PG) EXPIRES 9/29/16	NEEDS/PROBLEMS/COMMENTS:
		JAMES BEN FRANTZ , Son, filed a Petition for Appointment of Limited Probate Conservator of the Person of JAMES D. FRANTZ .	1. Need status report from PG. Note: Due to the numerous issues noted with the original petition filed by Mr. Frantz, the Court may require that a <u>new petition</u> be filed by the Public Guardian for general (not limited) conservatorship of the person and estate, with service on the proposed Conservatee and all relatives within the second degree, and all supporting documentation as required.
Aff.Sub.Wit.		On 8/18/16, the Court appointed the FRESNO COUNTY PUBLIC GUARDIAN as Temporary Conservator and set this status hearing re report from the PG.	
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			Reviewed by: skc
Status Rpt			Reviewed on: 9/23/16
UCCJEA			Updates:
Citation			Recommendation:
FTB Notice			File 21B- Frantz

Age: 4 mos.		TEMPORARY EXPIRES 09/29/2016 MARGARITA PEARL DONEZ, and JUSTIN GARCIA, maternal cousins, are petitioners. <u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS: Note: Maternal grandmother, Erlinda De La Torre, filed a competing petition on 08/16/2016. Hearing is set for 10/18/2016. Minute Order of 08/10/2016 re: Temporary Hearing states: The Court grants permission for Andrina Tobias, mother, to be noticed via Facebook or text message that includes all of the pertinent information; proof of any said message is to be brought to court. Note: Petition filed by Margarita Donez and Justin Garcia list the minor's name as Felicity Tobias and that is how it was entered in the Court's case management system. The Court Investigator's report includes a copy of the minor's birth certificate and lists the minor's name as Felicitie Tobias. The Court may wish to do a true name finding regarding the minor. 1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Father (Unknown) • Andrina Tobias (Mother) – Unless the Court Dispenses with notice. Note: Declaration filed 09/22/2016 includes text message to Ms. Tobias regarding hearing date. <u>Please see additional page</u>
Cont. from			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail w/		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: LV	
		Reviewed on: 09/26/2016	
		Updates:	
		Recommendation:	
		File 22- Tobias	

NEEDS/PROBLEMS/COMMENTS continued:

2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:
 - Paternal Grandparents (Unknown)
3. Need new order and letters with correct spelling of minor's name.

Petition to Determine Succession to Real Property

DOD: 8/3/15	LOIS HARRIS PERKINS , surviving spouse, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. There is no record that the original will has been deposited. Probate Code §8200. – Will attached to the petition is a color copy and not the original. 2. Attachment 11 does not state the decedent's interest in the real property as required. 3. Need Order.
	40 Days since DOD.	
	No other proceedings.	
Cont. from 090816	Will dated: 3/23/05 devises entire estate to spouse, Lois Harris Perkins.	
<input type="checkbox"/> Aff.Sub.Wit.	I & A - \$110,000.00	
<input checked="" type="checkbox"/> Verified	Petitioner requests Court determination that Decedent's interest in real property pass to her pursuant to Decedent's will.	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	W/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order	X	
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: KT
		Reviewed on: 9/23/16
		Updates:
		Recommendation:
		File 23- Perkins

Attorney Patricia L. Suda, of South Lake Tahoe, CA (for Petitioner Kathleen Suda, Co-Trustee)

Petition to Modify Trust and Revoke Exemption Trust

Willy DOD: 11/14/2015	KATHLEEN SUDA, Co-Trustee, is Petitioner.		NEEDS/PROBLEMS/ COMMENTS:
	Petitioner states:		1. Proposed order violates Local Rule 7.6.1(D), in that the proposed order refers to execution of the Seventh Amendment to the trust "attached to the <i>Petition</i> on file." Need revised proposed order that is drawn so that its general effect may be determined without reference to the <i>Petition</i> .
	<ul style="list-style-type: none"> Petitioner and Attorney Patricia L. Suda are two of four Co-Trustees of the WILLY K. AND LILY Y. SUDA TRUST dated December 1, 1988 and are the designees of the agents of the sole beneficiary of the trust, LILY Y. SUDA (copy of power of attorney authorization as Agents and Trustees attached as Exhibit 1 and 2; Petitioner has been authorized by the agents under Lily Y. Suda's power of attorney to sign all documents reflecting her rights as Trust beneficiary; The Trust was created as an A-B Split trust; as written, the EXEMPTION TRUST became irrevocable upon the death of Settlor Willy K. Suda; the EXEMPTION TRUST was created pursuant to a written declaration of trust of Willy K. Suda and Lily Y. Suda (copy attached as Exhibit "A"); Petitioner seeks to modify the A-B Trust and revoke the EXEMPTION TRUST, not create a MARITAL TRUST, and to manage the trust assets as a single "SURVIVOR TRUST;" The proposed modification is necessary because a mandatory split into an exemption trust and survivor trust and marital trust was created in order to plan for estate tax consequences, which no longer exist due to the current value of the trust assets and the changes made in the current federal and state estate tax laws, which eliminate any taxes on estates under \$5,430,000.00; The requested modification and revocation is necessary to make the Trust amendable and revocable by Lily Y. Suda, the surviving Settlor and primary beneficiary; the EXEMPTION TRUST is no longer necessary and maintaining it will create significant and unnecessary administrative costs; a MARITAL TRUST was not created; The beneficiaries have consented to the proposed modification (signed consents attached as Exhibit C). 		
Cont. from			Reviewed by: LEG
Aff.Sub.Wit.			
✓ Verified			Reviewed on: 9/26/16
Inventory			Updates:
PTC			Recommendation:
Not.Cred.			File 24- Suda
✓ Notice of Hrg			
✓ Aff.Mail	W /		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
	Petitioner prays for an order: <ol style="list-style-type: none"> Granting Permission to revoke the EXEMPTION TRUST and not create a MARITAL TRUST [and continue the Trust as a revocable single SURVIVOR TRUST only]; and Approving the execution of the SEVENTH Amendment to Trust (copy attached as Exhibit D.) 		

Petition for Probate of Will and for Letters Testamentary with IAEA

DOD: 12/15/12		SAMUEL HERNANDEZ and ALMA E. WELLS , Son and Daughter, Named Co-Executors without bond, are Petitioners. Full IAEA – ok Will dated 9/9/94 Residence: Fresno Publication: Business Journal Estimated value of estate: Real property: \$135,000.00 Probate Referee: Rick Smith (due to assignment in related matter)	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> See related matter at Page 27 of this calendar. <u>Note:</u> If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> Thursday, March 2, 2017 for filing Inventory and Appraisal Thursday, Nov. 30, 2017 for filing the first account or petition for final distribution. 	
<input type="checkbox"/>	Aff.Sub.Wit.			S/P
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 9/26/16	
			Updates:	
			Recommendation:	
			File 25- Hernandez	

Petitioner Valerie Jean Bland (Pro Per)

Petition for Appointment of Probate Conservator

			NEEDS/PROBLEMS/COMMENTS: CONTINUED TO 10/27/2016 Per Petitioner's request
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.	<input type="checkbox"/>	
<input type="checkbox"/>	Verified	<input type="checkbox"/>	
<input type="checkbox"/>	Inventory	<input type="checkbox"/>	
<input type="checkbox"/>	PTC	<input type="checkbox"/>	
<input type="checkbox"/>	Not.Cred.	<input type="checkbox"/>	
<input type="checkbox"/>	Notice of Hrg	<input type="checkbox"/>	
<input type="checkbox"/>	Aff.Mail	<input type="checkbox"/>	
<input type="checkbox"/>	Aff.Pub.	<input type="checkbox"/>	
<input type="checkbox"/>	Sp.Ntc.	<input type="checkbox"/>	
<input type="checkbox"/>	Pers.Serv.	<input type="checkbox"/>	
<input type="checkbox"/>	Conf. Screen	<input type="checkbox"/>	
<input type="checkbox"/>	Letters	<input type="checkbox"/>	
<input type="checkbox"/>	Duties/Supp	<input type="checkbox"/>	
<input type="checkbox"/>	Objections	<input type="checkbox"/>	
<input type="checkbox"/>	Video Receipt	<input type="checkbox"/>	
<input type="checkbox"/>	CI Report	<input type="checkbox"/>	
<input type="checkbox"/>	9202	<input type="checkbox"/>	
<input type="checkbox"/>	Order	<input type="checkbox"/>	
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>	
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>	
<input type="checkbox"/>	UCCJEA	<input type="checkbox"/>	
<input type="checkbox"/>	Citation	<input type="checkbox"/>	
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>	
			Reviewed by: LEG
			Reviewed on: 9/26/16
			Updates:
			Recommendation:
			File 26- Bland

Petition to Determine Succession to Real Property

DOD: 12/15/12	SAMUEL HERNANDEZ, ALMA E. WELLS, and ELUID HERNANDEZ, children, and BATYA HERNANDEZ, and MATEA HERNANDEZ, children of post-deceased son DAVID HERNANDEZ, are Petitioners.	NEEDS/PROBLEMS/COMMENTS: Note: See related matter at Page 25 of this calendar. 1. <u>As previously noted, the petition cannot go forward as filed.</u> Batya Hernandez and Matea Hernandez are not successors of this decedent; they are successors of post-deceased heir David Hernandez, who survived the decedent, but died 2/25/13. Pursuant to Probate Code §§ 13150 et seq., and as described in Law Revision Commission Comments, a petition under this section must be joined by all who succeed to the real property. The estate of post-deceased heir David Hernandez is the successor pursuant to §11801, not Batya and Matea individually. Once his estate succeeds to his share, Batya and Matea may then use summary proceeding to succeed to his estate. If the real property of Benita Hernandez is to pass via Petition to Determine Succession, need amended petition by all successors in interest, which would be Samuel, Alma, Eluid, and a personal representative of David's estate. <u>However</u> , it now appears that a full petition for probate has been filed for the Estate of Benita Hernandez. See Page 25 (16CEPR00854).										
Cont. from 080916, 092016												
Aff.Sub.Wit.	40 days since DOD	<table border="1"> <tr><td>Reviewed by:</td><td>skc</td></tr> <tr><td>Reviewed on:</td><td>9/27/16</td></tr> <tr><td>Updates:</td><td></td></tr> <tr><td>Recommendation:</td><td></td></tr> <tr><td>File 27- Hernandez</td><td></td></tr> </table>	Reviewed by:	skc	Reviewed on:	9/27/16	Updates:		Recommendation:		File 27- Hernandez	
Reviewed by:	skc											
Reviewed on:	9/27/16											
Updates:												
Recommendation:												
File 27- Hernandez												
Verified	No other proceedings											
Inventory	I&A: \$135,000.00 (real property located at 1881 S. Karen Ave., in Fresno)											
PTC	Will dated 9/9/94 devises the decedent's estate to her children who survive her, or the issue of children who predeceased her.											
Not.Cred.	Petitioners request Court determination that the decedent's property passes to them as follows:											
Notice of Hrg	<ul style="list-style-type: none"> Samuel Hernandez: 25% Alma E. Wells: 25% Eluid Hernandez: 25% Batya Hernandez: 12.5% Matea Hernandez: 12.5% 											
Aff.Mail	See Declaration filed 9/19/16											
Aff.Pub.	re authority re Batya Hernandez and Matea Hernandez as successors to this estate.											
Sp.Ntc.												
Pers.Serv.												
Conf. Screen												
Letters												
Duties/Supp												
Objections												
Video Receipt												
CI Report												
9202 Order												
Aff. Posting												
Status Rpt												
UCCJEA												
Citation												
FTB Notice												